

City of Minneapolis Human Resources Department

Phased Retirement Request and Job Change Form

This form must be completed by the supervisor/manager of an employee requesting the PERA Phased Retirement option. The supervisor/manager should work with department management including the department's HR Generalist to determine whether the City will grant the employee's Phased Retirement request. The City of Minneapolis has the sole authority to determine whether a Phased Retirement request will be approved.

Employee ID Number	Employee Name	
Date of Birth	Date of Hire	Supervisor's Name
Funding String (Current position)		Funding String (New position)
Job Code and Job Title (Position Number – if they keep the same position but change it from full time to part time)		
Initial Phased Retirement Date		End of Initial Period (up to 1 year following Phased Retirement Date)
Phased Retirement Renewal Date		End of Renewal Period (up to 1 year following renewal date)
Hours Currently Working Per Week		Hours Per Week During Phased Retirement (Hours must be reduced by at least 25% and no more than 1044 hrs/yr or 20 hrs/wk)

Department must determine if the employee's request for Phased Retirement meets a business need, such as:

- ☐ Due to department reorganization, the employee's job will be reduced to part time and the job will be eliminated at the end of the phased retirement period
- ☐ The retiring employee will be replaced and in order to train a replacement a job overlap is required for a limited period of time
- ☐ Other, please explain

Note: If request is approved, a PERA Phased Retirement Agreement and an Application for PERA Retirement Benefits must also be completed and returned to PERA.

☐ Deny

**Employee
Signature**

Date

Approved By

(Signature of Supervisor/Manager)

Date

Approved By

(Signature of Department Head)

Date

Submitted By

(Signature of Human Resources Generalist)

Date

Entered into HRIS by: _____ Phone: _____ Date _____

Distribution: Original: Department Personnel File
Last Updated: August 22, 2014

Copies: Employee, HR/Benefits, Central Payroll

PERA PHASED RETIREMENT PROCEDURES

- 1) PERA's **Phased Retirement Option** allows eligible Coordinated Plan members to receive a pension while working on a reduced hour schedule. An employee interested in, and eligible for, the PERA Phased Retirement option should meet with his/her supervisor and/or HR Generalist. The supervisor or HR Generalist will work with department management to determine if the Phased Retirement option will be offered.
- 2) The City of Minneapolis has the sole authority to determine whether an employee's request for Phased Retirement will be approved. Examples of situations where a department could approve such as request are as follows:
 - Due to department reorganization, an employee's job will be reduced to part time and the job will be eliminated at the end of the phased retirement period.
 - The retiring employee will be replaced and in order to train a replacement, a job overlap is required for a limited period of time
- 3) The supervisor/manager must verify that an employee requesting Phased Retirement meets the following criteria:
 - a. Is a participant in PERA's Coordinated Plan
 - b. Has worked at least 1,044 hours per year for the past 5 years; and
 - c. Is at least age 62
- 4) The HRG and/or supervisor should meet with the employee to review:
 - a. Requirements relating to Phased Retirement, and
 - b. The effect that a transfer from full time to part time status has on the City's group insurance, paid time off and optional benefit plans.
- 5) If the employee's request is approved and the Phased Retirement date and part time schedule are determined, the City's Phased Retirement Request and Job Change Form must be completed with copies distributed as appropriate.

Important: The employee must be advised to contact PERA to request a PERA Phased Retirement Agreement and an Application for PERA Retirement Benefits. These forms are available at www.mnpera.org under the Forms and Publications tab.

PERA must receive their agreement and application forms before the employee begins their Phased Retirement assignment.

- 6) The *initial* Phased Retirement period cannot exceed one year. The City may extend the individual's employment for additional periods of up to one year each. The total period of Phased Retirement may not exceed five years.

A new City Phased Retirement Request and Job Change Form and a new PERA Phased Retirement Agreement must be completed to extend the employees Phased Retirement status beyond the initial term.